



The future of reporting to SBA

There is a new CRM in town!

After making software for 10+ years for SBDC and WBC advisors GrowthWheel have started developing GrowthWheel NG: The next generation software to make SBA reporting easier and better for everyone.



Smart conditional logic and data validations on the form to avoid errors in SBA-reporting.



Beautiful look and feel designed to give you the best experience of reporting every day.



Integrated with the other work you do with client companies on GrowthWheel Online.

WBC and SBDC advisors have helped thousands of companies going digital and working in a more efficient way.

Now the time has come for small business advisors themselves to take advantage of the best technologies to support their important work.

With the upcoming launch of **GrowthWheel NG** for SBA-funded agencies you can now generate error-free reports for EDMIS NG.

You and your clients can enter and update information faster and easier than ever before, so you can focus on what matters most.

Designed to Make You Love Your Work! ❤️

Key features of the future of GrowthWheel NG reporting:

Form 641

- Clients fill out 641 forms on GrowthWheel Online or embedded on your website.
- Mobile-friendly forms with data validations.
- Logical structured interface in sections.

Counseling Sessions

- Record all information you and your clients need, beyond SBA requirements.
- Real-time validations of required information.
- Automatically generated email template with meeting minutes.

Client Company	Currently in business	Military status	Race	Ethnicity	Gender	Disabilities	Fee
Los Andes Coffee...	<input type="checkbox"/>	Select status	Black or African...	Select Ethnicity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HO Magazine	<input checked="" type="checkbox"/>	Member of Nat...	Black or African...	Not Hispanic or...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cubic Design Studio	<input checked="" type="checkbox"/>	Select status	Select race	Select Ethnicity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Parliament LTD	<input checked="" type="checkbox"/>	Select status	Select race	Select Ethnicity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ethics Planet	<input checked="" type="checkbox"/>	Select status	Select race	Select Ethnicity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Training Participants	Race		
Currently in Business	10	Asian	2
Not Yet in Business	10	White	7
People with Disabilities	2	Native Americans or Alaskan Natives	3

Form 888

- Track individual participation or add aggregated totals.
- Supports individual multi-session training events.
- Data entry with icons and few clicks.



Learn more about this feature and future updates on growthwheel.com/nextgen